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TVB

A RESEARCH TREND REPORT

TRENDS IN RETAIL STORE CATEGORIES

1989

Prepared by the TVB Research Department

4/90

Television Bureau of Advertising, Inc., 477 Madison Avenue, New York, New York 10022 (212) 486-1111

TOP LOCAL TV USERS

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Highlights

- This report focuses on the top 15 advertisers in nine selected retail store categories and covers 135 local advertisers.

- Five of the top 15 lists led their respective categories in percent gains for both '89 and '88.

- The retailers posting the largest percent gain in each category were as follows:

Radio Shack (Appliances)	+	8815%
Home Furnishings Center (Carpets)	+	132%
Eagle Men's Clothing (Cloth.)	+	inf %
Montgomery Ward (Dept. Stores)	+	379%
Biggs (Discount Dept. St.)	+	761%
Sav-On (Drug)	+	195%
7-Eleven (Food)	+	47%
Ortho Factory Showrooms (Furniture)	+	355%
Home Depot (Home Centers)	+	880%

APPLIANCE STORES
TOP 15 LOCAL TELEVISION ADVERTISERS
1989

		1988	1989	% Chg.
1.	Circuit City	$30,942,400	$41,072,000	33%
2.	Highland	22,792,800	20,551,000	-10%
3.	Blockbuster Video Rental	2,060,700	11,632,000	464%
4.	Silo	9,605,500	9,698,300	1%
5.	Best Buy Co.	7,701,300	8,010,500	4%
6.	The Wiz	3,100,900	5,018,500	62%
7.	Newmark & Lewis	3,643,900	4,246,700	17%
8.	Good Guys TV & Stereo	2,005,000	2,609,900	30%
9.	ABC Warehouse	1,611,700	2,036,000	26%
10.	Luskins	2,573,000	1,891,100	-27%
11.	Phil & Jim's	1,924,200	1,698,300	-12%
12.	Radio Shack	15,900	1,417,500	8815%
13.	McDuff	253,700	1,394,000	449%
14.	Sound Playground	1,019,200	1,349,800	32%
15.	Dow Sound City	622,900	1,014,600	63%
	TOTAL TOP 15	$89,873,100	$113,640,200	26%

Source: TVB from estimates supplied by Arbitron

CARPET & FLOOR COVERING STORES
TOP 15 LOCAL TELEVISION ADVERTISERS
1989

		1988	1989	% Chg.
1.	New York Carpet World	$9,597,800	$9,272,100	-3%
2.	Empire Home Service & Carpets	5,000,000	5,614,000	12%
3.	Carpeteria	3,036,900	3,132,000	3%
4.	Spectrum Carpet	1,104,800	1,919,200	74%
5.	Carpetland USA	1,182,200	1,630,900	38%
6.	Banner Carpet	1,511,000	1,267,100	-16%
7.	G.A. Dalton Carpet Outlet	678,900	1,229,500	81%
8.	Giant Carpet	1,275,200	1,162,700	-9%
9.	Clyde's Carpet	1,078,700	1,118,600	4%
10.	Kaufman Carpet Co.	2,122,300	935,300	-56%
11.	Carpets of Dalton	449,100	909,000	102%
12.	Home Furnishings Center	334,300	776,300	132%
13.	Olson Rug	411,100	631,800	54%
14.	Bill's Carpet	574,600	616,100	7%
15.	Lincoln Upholstery & Carpet	587,600	552,900	-6%
	TOTAL TOP 15	$28,944,500	$30,767,500	6%

Source: TVB from estimates supplied by Arbitron

CLOTHING STORES
TOP 15 LOCAL TELEVISION ADVERTISERS
1989

		1988	1989	% Chg.
1.	C & R Clothiers	$16,850,200	$17,805,700	6%
2.	Burlington Coat Factory	13,691,200	16,280,200	19%
3.	Clothestime	3,766,300	15,542,700	313%
4.	T.J. Maxx	9,268,900	9,690,000	5%
5.	Marshall's	10,410,000	9,672,800	-7%
6.	Men's Warehouse	6,148,300	8,762,500	43%
7.	Ross Discount	5,675,400	6,822,700	20%
8.	S & K	5,073,000	5,653,700	11%
9.	Miller's Outpost	6,640,600	4,545,800	-32%
10.	Sym's	2,907,600	3,195,700	10%
11.	NBO	2,234,200	2,230,000	0%
12.	Anderson Little	849,100	2,209,800	160%
13.	Kuppenheimer Outlets	3,676,600	2,105,000	-43%
14.	Eagle Men's Clothing	---	1,941,000	+INF
15.	Annie Sez	1,319,400	1,675,700	27%
	TOTAL TOP 15	$88,510,800	$108,133,300	22%

Source: TVB from estimates supplied by Arbitron

DEPARTMENT STORES
TOP 15 LOCAL TELEVISION ADVERTISERS
1989

		1988	1989	% Chg.
1.	Sears	$13,271,400	$43,307,800	226%
2.	Montgomery Ward	4,850,700	23,239,300	379%
3.	Mervyn's	10,038,900	19,874,900	98%
4.	Macy's	15,413,800	16,777,400	9%
5.	Hills	11,374,700	15,755,000	39%
6.	Emporium Capwell	4,480,700	6,329,200	41%
7.	Lazarus	2,602,300	5,327,000	105%
8.	J.C. Penney	5,272,400	4,285,500	-19%
9.	Abraham & Strauss	3,946,400	3,696,800	-6%
10	Kohls	1,641,400	3,430,000	109%
11.	May Co.	3,404,400	3,363,500	-1%
12.	Broadway	3,761,200	3,054,500	-19%
13.	Jacksons Byrons	2,758,600	2,826,000	2%
14.	Dillard's	4,088,800	2,765,200	-32%
15.	Bon's	3,153,000	2,340,900	-26%
	TOTAL TOP 15	$90,058,700	$156,373,000	74%

Source: TVB from estimates supplied by Arbitron

DISCOUNT DEPARTMENT STORES
TOP 15 LOCAL TELEVISION ADVERTISERS
1989

		1988	1989	% Chg.
1.	Wal-Mart	$26,493,300	$34,117,100	29%
2.	Target	11,780,200	19,144,500	63%
3.	K Mart	22,499,300	12,915,700	-43%
4.	Ames	2,472,200	9,321,300	277%
5.	Fred Meyer's	8,392,600	8,435,200	1%
6.	Value City	3,859,200	6,529,000	69%
7.	Meijer	4,069,100	3,501,600	-14%
8.	Bradlees	2,773,600	3,465,600	25%
9.	Smitty's	3,081,200	3,454,700	12%
10.	Biggs	195,700	1,685,700	761%
11.	Jamesway	1,100,400	1,457,000	32%
12.	Makro	1,074,400	1,391,600	30%
13.	Zayre	12,664,700	1,372,200	-89%
14.	Fortunoff's	1,490,300	1,313,600	-12%
15.	Shopko	2,186,200	1,287,500	-41%
	TOTAL TOP 15	$104,132,400	$109,392,300	5%

Source: TVB from estimates supplied by Arbitron

DRUG CHAINS
TOP 15 LOCAL TELEVISION ADVERTISERS
1989

		1988	1989	% Chg.
1.	Eckerd	$16,908,400	$19,003,400	12%
2.	Walgreen	12,306,400	15,329,100	25%
3.	CVS	4,115,700	6,072,600	48%
4.	Osco	3,205,000	4,380,600	37%
5.	Pay Less	2,049,900	4,283,400	109%
6.	Drug Emporium	2,789,500	3,973,700	42%
7.	Thrifty	3,227,200	3,743,400	16%
8.	People's	4,228,000	3,433,700	-19%
9.	Sav-On	1,160,900	3,421,600	195%
10.	Revco	3,783,500	2,830,700	-25%
11.	Perry	1,986,900	2,606,000	31%
12.	Fay's	2,961,000	2,424,800	-18%
13.	Thrift	2,102,100	2,018,300	-4%
14.	Super X	2,478,000	1,749,900	-29%
15.	Arbor	1,015,700	1,713,700	69%
	TOTAL TOP 15	$64,318,200	$76,984,900	20%

Source: TVB from estimates supplied by Arbitron

FOOD CHAINS
TOP 15 LOCAL TELEVISION ADVERTISERS
1989

		1988	1989	% Chg.
1.	Kroger	$28,031,300	$26,474,900	-6%
2.	Winn-Dixie	18,644,400	21,888,300	17%
3.	7-Eleven	14,673,600	21,538,200	47%
4.	Lucky	15,665,000	15,610,000	0%
5.	Safeway	16,064,400	15,407,300	-4%
6.	Publix	9,891,900	13,368,700	35%
7.	Food Lion	9,105,300	11,647,200	28%
8.	Albertsons	13,281,300	9,106,500	-31%
9.	Vons	9,842,000	8,894,500	-10%
10.	Jewel	9,582,300	8,843,500	-8%
11.	Cub	7,984,700	8,510,400	7%
12.	AM PM Mini Market	7,272,700	7,425,600	2%
13.	Shop Rite	4,836,000	6,241,200	29%
14.	Dominicks	7,323,900	5,647,700	-23%
15.	Ralphs	7,701,600	5,153,000	-33%
	TOTAL TOP 15	$179,900,400	$185,757,000	3%

Source: TVB from estimates supplied by Arbitron

FURNITURE STORES
TOP 15 LOCAL TELEVISION ADVERTISERS
1989

		1988	1989	% Chg.
1.	Levitz	$10,468,000	$16,530,400	58%
2.	Big Sur Waterbed Store	10,158,200	14,155,600	39%
3.	Seaman's	9,499,700	9,303,500	-2%
4.	La-Z-Boy Showcase Shop	6,638,500	6,787,500	2%
5.	Ortho Factory Showrooms	1,477,900	6,727,800	355%
6.	Art Van	4,480,500	6,042,200	35%
7.	Sun-Valley Waterbeds	6,175,400	5,070,000	-18%
8.	Ethan Allen	1,330,300	4,089,200	207%
9.	Roberd's	3,912,100	4,007,600	2%
10.	Wickes	4,947,800	3,973,200	-20%
11.	Value City Furn. Warehouse	3,375,800	3,951,000	17%
12.	Furnishings 2000	6,861,600	3,745,800	-45%
13.	R B Furniture	3,000,000	3,488,600	16%
14.	Haverty Furniture	1,977,900	3,393,200	72%
15.	American Furniture	2,498,000	3,021,600	21%
	TOTAL TOP 15	$76,801,700	$94,287,200	23%

Source: TVB from estimates supplied by Arbitron

HOME CENTERS & HARDWARE STORES
TOP 15 LOCAL TELEVISION ADVERTISERS
1989

	1988	1989	% Chg.
1. True Value	$18,315,000	$19,421,800	6%
2. Home Depot	1,566,300	15,350,200	880%
3. Home Club Warehouse	11,047,400	12,717,200	15%
4. Builders Square	4,322,700	4,324,300	0%
5. Menard Cashway	2,484,300	3,145,800	27%
6. Lowe's Building Supply	1,972,500	2,780,700	41%
7. Coast to Coast	2,517,900	2,146,000	-15%
8. Orchard Supply	2,492,000	2,122,500	-15%
9. Channel	2,746,400	2,010,900	-27%
10. Handy Andy	1,343,300	1,971,800	47%
11. Grossman's Lumber	3,253,000	1,762,100	-46%
12. Builders Emporium	2,528,600	1,760,100	-30%
13 Pella Window Store	207,500	1,672,700	706%
14. Pergament	1,828,800	1,582,400	-13%
15. Ernst	1,144,100	1,462,900	28%
TOTAL TOP 15	$57,769,800	$74,231,400	28%

Source: TVB from estimates supplied by Arbitron